Washington State Department of Transportation

Memorandum

April 1, 2002 Memo: 02-03

TO: Jim Green-Equipment Superintendent OR
Curt Gegoux- Equipment Superintendent NWR
Bruce Haley- Equipment Superintendent SCR
Craig Clouse- Equipment Superintendent ER
Brad Littlefield- Equipment Superintendent NCR
Jerry Stark- Equipment Superintendent SWR

FROM: Brian Ziegler; Director
Maintenance & Operations

SUBJECT: Instructional Memo TEF 02-03 Preventative Maintenance Performance

I. Purpose:

To speedily establish a uniform program wide policy on launching the FEMS preventative maintenance scheduler; and for establishing, completing, and tracking preventative maintenance (PM) Shop Service Work Orders.

II. Discussion:

PM performance is one of the most important tasks done by the OTEF program. When done properly, this vital process identifies problems, and compels corrective action, before the problem renders a unit non-operational.

The Fleet & Equipment Management System (FEMS) is the department's tool for scheduling and recording the accomplishment of PM. Service information accumulated in the system enables evaluation and measurement of administrative and operational aspects related to agency vehicle and equipment performance. It will also be used to evaluate the program's success in PM performance.

With the above in mind, it is imperative that the Shop Service Work Order methodology shown below is followed to assure PM data integrity and accuracy.

III. PM Scheduling:

1. Individualized methods will not be used to schedule equipment PM services.

2. Each Friday**,** the Equipment Administration Office will launch the system PM forecaster. Each forecast will cover the upcoming 90-day period to allow supervisors to plan and coordinate shop activities well in advance.

3. When this PM scheduler launch occurs, the system automatically creates a Service Work Request for each individual service due. These work requests shall be the basis of service initiation, as discussed below.

4. Scheduled services may be viewed on the FEMS (M4) W41 screen at any time.

IV. Initiating a PM Shop Service Work Order:

1. As mentioned above, every PM Shop Service Work Order must be initiated from system generated work requests; to ensure that service accomplishment is processed efficiently and completely. If a work request is not used to initiate PM performance; and it is left unattended, that scheduled PM will remain in the system as due.

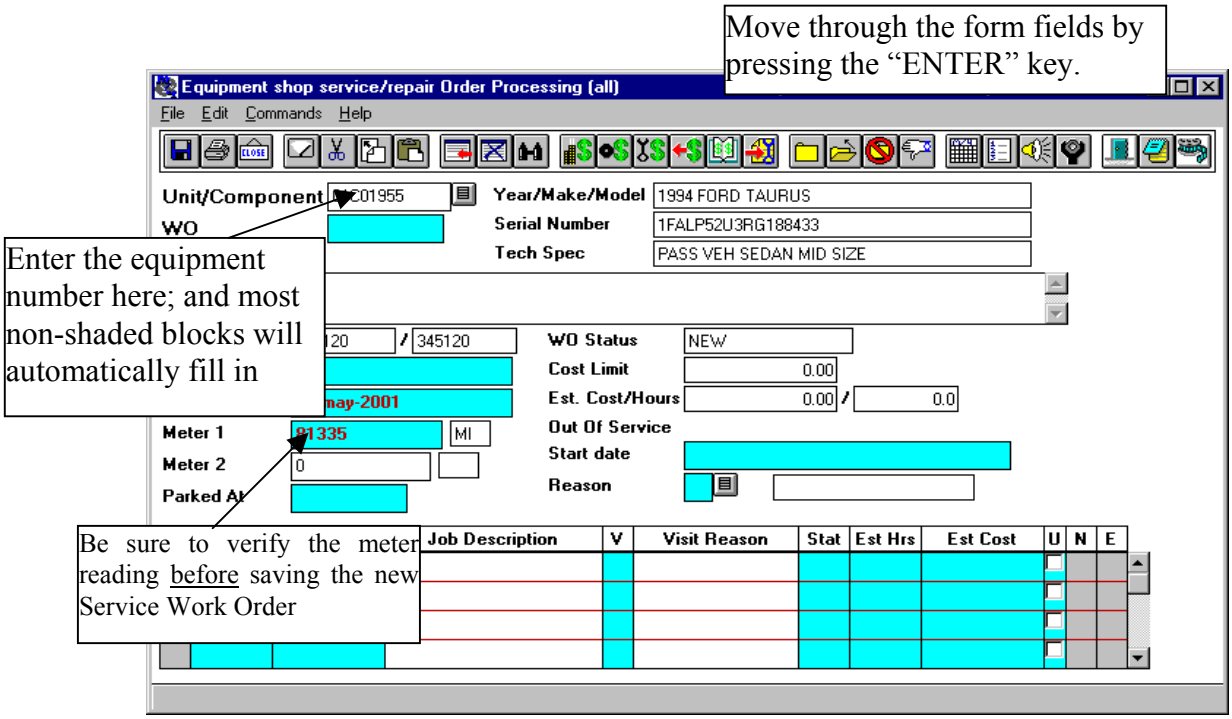
2. Use the following steps to convert system work requests to PM Shop Service Work Orders:

   a. Log onto the M4 system.

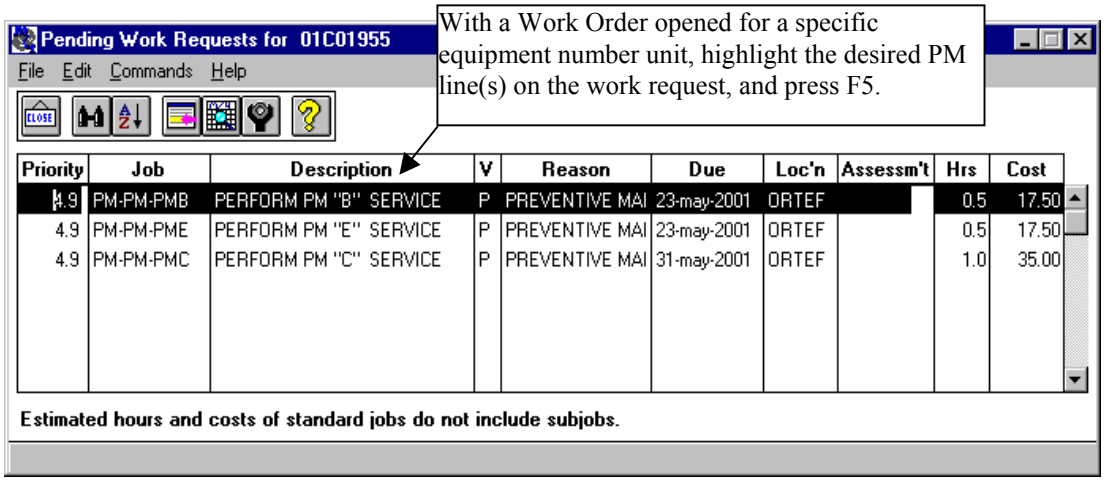
   b. Open a Shop Service Work Order for the subject equipment numbered unit by entering the equipment number in the block titled *"Unit / Component."* See the screen picture below for an example.

      1) Use visit reason "P" (PM) for the new Shop Service Work Order.

      2) Be sure to verify the odometer reading, and make necessary meter reading changes, at this point.



c. When a Shop Service Work Order is opened for a unit, the work request box shown below will automatically pop-up; reflecting scheduled PM services pending for 90 days out:



d. Transfer the PM work request information to the Shop Service Work Order by highlighting the appropriate work request line and pressing the **F5 key** on the computer keyboard.

1) This simple action will automatically transfer the equipment and PM information to the Shop Service Work Order; and it cancels out the work request for that individual service.

2) The PM job line(s) now appearing on the Shop Service Work Order should reflect visit reason "P" (PM) also.

3) Multiple PM work requests may be transferred to a single Shop Service Work Order, in the described fashion.

V. Performing PM and Completing PM Shop Service Work Orders:

1. Faults noted during a PM inspection should be entered as separate job lines on the PM Shop Service Work Order (or on another Work Order), so that they are readily associated with PM performance. Be sure to use visit reason "F" (repair due to a PM service) to ensure this association.

2. Immediately after the primary requirements of a scheduled service are done, the PM line on the Shop Work Order must be date stamped as completed, by highlighting the job line status field and type "DON."

3. It is not necessary to correct all faults found during a PM inspection (visit reason F) to annotate the PM job line (visit reason P) as completed.

   For example: If a PM requirement is to inspect fan belts for cracks, when the belts inspection is done that requirement is complete. If the fan belts were found to be defective during the inspection, that fault becomes a separate "F" visit reason job line – which may be accomplished after the PM is completed.

4. Waiting until all faults are corrected before annotating the PM line as completed will likely result in the PM being reported as overdue.

VI. PM Performance Measuring:

1. The program's PM performance goal is to complete at least 90% of all scheduled services within 10% of the scheduled due date.

   For example: a quarterly (90 days) service needs to be completed within 9 days following the due date: an annual service (365 days) needs to be completed within 36 days following the due date.

2. The above performance goal shall be measured and reported at least annually. These measurements will be accomplished by comparing all PM due dates to:

   a. Completion dates reported on each Shop Service Work Order PM job line (visit reason P); AND

   b. To the report period ending date on all existing system work requests – which have not been converted to a Service Work Order.

CC:	Jerry Walter	Tom Lentz	Casey McGill
	Larry Chatterton	Robert Stowe	Mary Legry